

NAME:

DATE:

Planning for Financial Success

Preview this document and note the main topics and ideas. Use these activity pages to take notes and record ideas as you learn. Be sure to save the document with a logical file name in your personal workspace so you can refer back to it later.

Write definitions for the key terms in your own words.

Key Term	Definition
financial decision making	
financial goals	

Answer the question.

1. What are four steps to take when making a financial decision?

Answer

Your Financial Plan

What are some financial goals you have for the upcoming year? List at least three financial goals and some steps you will need to take to achieve them.

Goal	Steps to Achieve Goal

Pick one financial goal, and then answer the questions about that goal. Be honest with yourself about your ability to meet the goal.

Goal: *Answer*

1. How much is this decision going to cost me?

Answer

2. Can I afford this decision right now?

Answer

3. How will this decision impact my budget?

Answer

4. Can I save for this decision now?

Answer

Optional: Create a Vision Board

Create a vision board to help you visualize your goal. To create a vision board, you should draw or find images that help you see what you are trying to achieve. Your vision board could take the form of a collage or an image. Assemble anything that inspires you: photos; quotes; images of places you want to go; and reminders of events, places, or people.

Reflect

Answer the questions.

1. What have you learned about setting financial goals?

Answer

2. What is one thing you will do in the future when making financial decisions?

Answer